

[Ross E. Mitchell](#) (2004) 'Trees don't Talk: A Methodological Account of a Forest Sociologist in Mexico'

Sociological Research Online, vol. 9, no. 1, <<http://www.socresonline.org.uk/9/1/mitchell.html>>

To cite articles published in *Sociological Research Online*, please reference the above information and include paragraph numbers if necessary

Received: 5/9/2003 Accepted: 13/2/2004 Published: 28/2/2004

Abstract

This paper examines personal experience as both a sociologist and forester collecting data in the southern state of Oaxaca, Mexico. It builds on writings where researchers have taken an introspective or auto/biographical approach to problematizing their own involvement. My findings illustrate that demographic and social features such as gender, nationality, and language can both hinder and privilege social science research. Moreover, this paper disputes the contention that expertise in a given specialty automatically makes for good field research. Depending upon the type of research and the questions being addressed, previous professional experience may actually hinder the building of rapport in certain cases. Genuine efforts to engage in local discourse can ultimately serve to improve fieldwork, and contribute to mutual understanding.

Keywords:

Community Forestry; Fieldwork; Methodology; Mexico; Oaxaca; Researcher Privilege; Sociology

Introduction

1.1

Sociological fieldwork presents a unique set of challenges. Among these, significant disparities such as gender, race, religion, or class likely exist between the researcher and the researched. While certain differences may be overcome, others may not. Such distinctions are occasionally used to mutual advantage ([Metcalf, 2002](#); also see chapters in [Whitehead and Conaway, 1986](#)). Other factors such as negotiating entry and building rapport change according to the circumstances often outside of a researcher's control, and hopes for maintaining neutrality are occasionally dashed.^[1] A researcher's own 'history/biography' may also overlap in relation to particular social locations ([Stanley, 1993](#)). As social scientists, we can only address such

dilemmas by realizing that our research activities say as much about ourselves as those we choose (or who let us choose) to be researched ([Steier, 1991](#)).

1.2

Given these fieldwork challenges, I examine here the complexities of fieldwork through a 'confessional tale', focusing on recent research in two mountain communities of southern Mexico. In brief, 'a confessional tale is that of a fieldworker and a culture finding each other and, despite some initial spats and misunderstandings, in the end, [hopefully] making a match' ([van Maanen, 1988](#):79,94). Max Weber ([1949](#)) and C. Wright Mills ([1959](#)) were among the first in sociology to write about personal involvement in research. One of the best-known examples of the confessional genre can be found in the Appendix to *Street Corner Society*, William Foote Whyte's ([1981](#):279-358) timeless urban ethnography of street gangs (cf., [Behar, 1999](#)).^[2] Other fieldwork reflections are abundant in the literature (e.g., see [Golde, 1986](#); [Haley, 1999](#); [Kearney, 1992](#); [Ladino, 2002](#); [Metcalf, 2002](#); [Rabinow, 1977](#); [van Maanen, 1988](#); [Vázquez García, 2001](#); [Whitehead and Conaway, 1986](#)). The confessional tale is also part of the emerging trend in auto/biographical research ([Cotterill & Letherby, 1993](#); [Stanley, 1993](#); [Steier, 1991](#)). Still, mainstream academia has not wholeheartedly embraced this genre ([van Maanen, 1988](#)). Without such introspection, social science research results may not only seem somewhat dry; they can obfuscate how challenges were faced and addressed in the field.

1.3

This paper explores how I, a foreign researcher in Mexico, was received, constructed, interpreted, and even altered by 'others'. The use of 'I' is deliberate, since I agree with Gayle Letherby and others who believe that by '[w]riting as 'I' we take responsibility for what we write' ([Letherby, 2003](#):7; see also [Cotterill and Letherby, 1993](#); [Stanley, 1993](#)). More specifically, it highlights field strategies in my shifting role as a forest sociologist. My success or failure rested on my ability to recognize multiple identities and motives assigned to me by respondents (see also [Ladino, 2002](#):6.1). Recognizing that 'it is the researcher and not the respondent who gains privileges and advantages' ([Letherby, 2003](#):120), the onus was on me to deconstruct, alter, or adapt such perceptions. My positionality - as a forester, a sociologist, a development worker, a foreigner, a male, a friend, a stranger, etc. - admittedly privileged me, although sometimes due more to good timing than to a carefully thought out positioning of 'self'. Yet, at times these epistemic typologies also worked to my disfavour no matter how hard I tried to downplay my cultural predispositions.

1.4

In this paper, I first briefly discuss related field research in Mexico for comparisons. This is followed by an analysis of field research challenges and their implications for understanding. I end with a synopsis for other researchers conducting fieldwork in unique cultural contexts.

Other Field Research in Oaxaca

2.1

Many Oaxacan social scientists have at least partially situated their field experiences within their respective works ([Cohen, 1999](#): xi-xiv, 1, 85-87, 107-109, 175-176; [Rubin, 1997](#): ix-xii, 3-6). Other researchers have more explicitly reflected on their field encounters in various Oaxacan communities. An example of this latter approach is Campbell's ([2001](#)) personal account of the dynamic tensions and contradictions of his fieldwork on radical politics in Juchitán, Oaxaca. Campbell calls for a rethinking of rapport or 'bonding', and recognizes his multiple roles as a white, foreign, and political activist researcher once married to a local woman. His

forthright discussion of alcohol as an unorthodox rapport-builder in the bohemian cantinas and *velas* (fiestas) of Juchitán also shares similarities to Laura Nader (1986) and Michael Kearney's (1992) accounts.

2.2

Some Oaxacan researchers encountered villager's doubt as to their motives, especially during the early stages of their work. Nader (1986) was accused of being a Protestant missionary and Kearney (2004) was suspected of being a gold prospector. Both went to some pains to correct these mistaken notions. In Nader's case, the village priest consulted an outside source to verify her credentials as a Catholic anthropologist. In contrast, to explain his presence in the town, Kearney placed much of the 'blame' at his *muy duro* (very strict) professors at Berkeley for sending him to such a forlorn place (Kearney, 2004). This was more believable than the 'real' but boring explanation of just wanting to study the locals. Jeffrey Cohen and his wife taught English during their stay in Santa Ana del Valle, which led some villagers to believe that they were part of a government project to train workers in a foreign language (Cohen, 1999:107-109, 175- 176). Once they had arranged to work as *maestros* (teachers), they gained a new and lasting identity. They were transformed from 'odd gringos', sharing little in common with their neighbours, to accepted members of the village, without losing their status as 'outsiders and oddities' (Cohen, 1999:109).

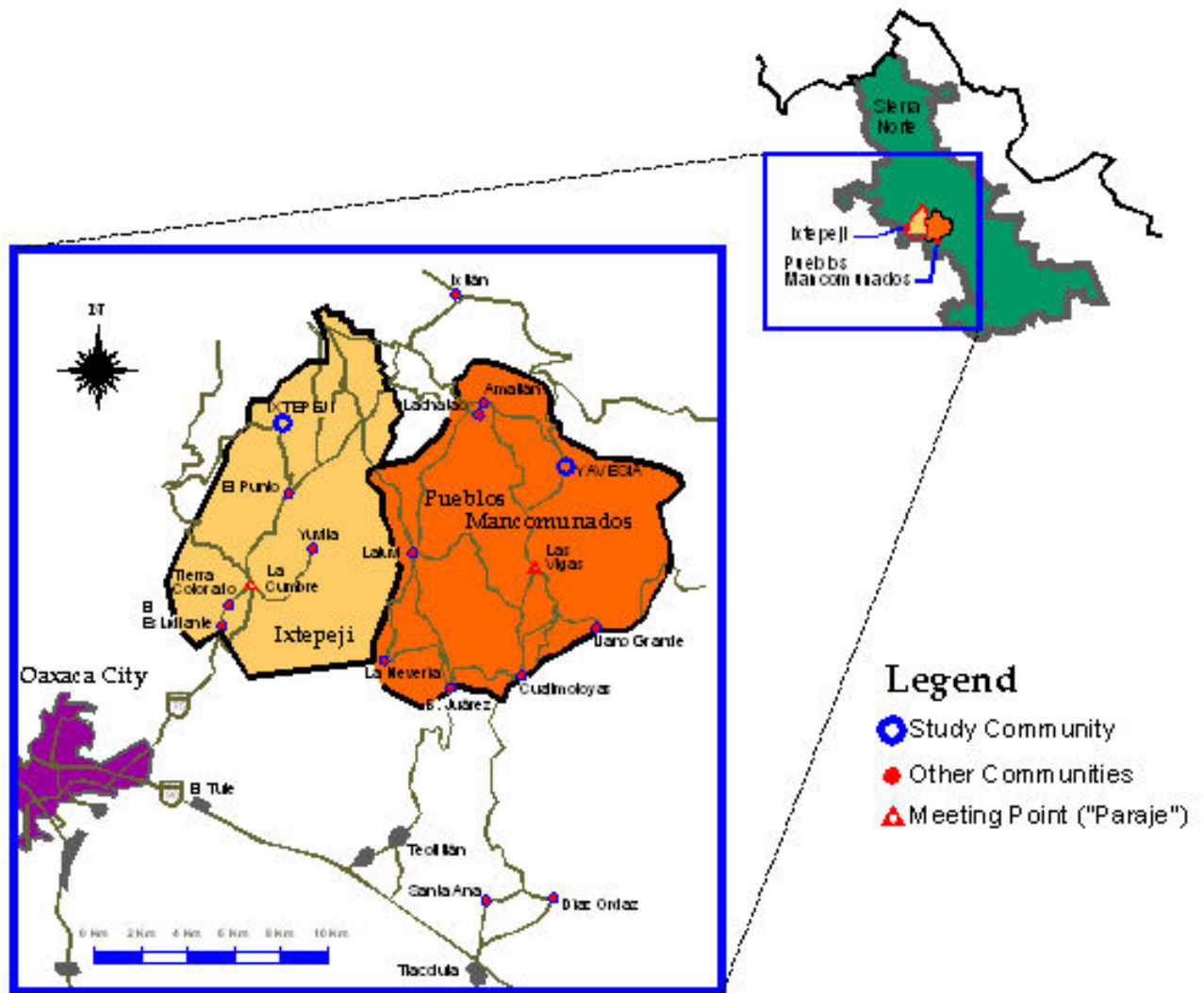
2.3

Outside of Oaxaca, anthropologist François Lartigue (1983) spent several years studying forestry exploitation among the Sierra Tarahumara of Chihuahua. Lartigue's relationship with his respondents was always in flux, a negotiated balance that was better seen from being on 'the edge', never too far inserted nor external to the community: 'What I saw and what was told to me, took place within a relation in constant process of modification' (Lartigue, 1983:141). Another self-reflective account can be found in Carolina Ladino's (2002) fieldwork account in the shantytowns of northern Mexico (Juárez). As a Colombian feminist, and unlike white, western researchers in Mexico, Ladino felt that her fluency in Spanish and cultural empathy would help her gain acceptance. To her surprise, local Juarenses consider Colombians as 'southerners', and stereotype them as backward, dirty, and untrustworthy. Foreign researchers were expected to 'look' western. One interviewee made this comment when Ladino attempted to describe the purpose of her visit: 'Carolina, you make yourself sound so important, like one of those researchers from abroad!' (Ladino, 2002:4.6). It was her experience of 'shared vulnerabilities', however, as a female living in a dangerous situation of unprecedented urban violence against women that helped her to gain trust and build friendships. Ladino also recognizes that host populations construct and re-construct identities of the visiting researcher while in the field, and that the boundaries of 'differences' are in constant flux.

2.4

Notably, the above researchers are all non-Mexicans. This may explain partly why so much emphasis was placed on their gaining entry into a community. In contrast, Olga Montes García has recently reflected on her research experiences on urban entrepreneurs of Oaxaca (Montes García, 2001). She was cognizant of her role as a female anthropologist, a Oaxacan native, and a Zapotec descendent, but also the stigma attached to being perceived as from a lower social class than those she studied. In order to 'objectively' understand her respondents, and given the subtle racism she encountered, it was incumbent upon her to hide feelings of antipathy. In so doing, she was able to re-evaluate herself in a new light as both 'dominated' and 'dominant'. Her time spent with Oaxacan elites was in sharp contrast to previous experiences with indigenous peoples of the Sierra Norte. With some irony, she notes that the indigenous *campesinos* (peasant farmers) respected the researchers' position of privilege and knowledge, whereas the reverse was true with the elites.

My research took place over a period of seven months in 2002. The natural environment is an integral aspect of the daily life of Santa Catarina Ixtepeji and Santa María Yavesía, the two communities selected for study in the District of Ixtlán. See [Map 1](#) below



Ixtepeji is where anthropologist Michael Kearney carried out his field research as a University of California Berkeley Doctoral student in the 1960s, and later wrote *The Winds of Ixtepeji* ([Kearney, 1972](#); see also [Kearney, 1992](#)). The municipality of Ixtepeji with 2,532 inhabitants (Census 2000) is located at 1,880 meters. Without realizing it when considering Ixtepeji for my research, I was following in Kearney's footsteps and engaging in some longitudinal comparisons (see also endnote [3](#)). The municipality of Yavesía is much smaller with 460 inhabitants (Census 2000) and is located another two hours east. At 2,000 meters high, Yavesía is even more isolated than Ixtepeji.

<http://www.socresonline.org.uk/9/1/mitchell.html> (4 of 17)3/7/04 4:53:51 PM

Two points bear mentioning concerning my epistemological approach. My study purpose was to explore the construct of 'ecological democracy' as defined by community forest decision-making in the state of Oaxaca, southern Mexico (<http://www.planeta.com/ecotravel/mexico/oaxaca/oaxacatrees.html>).^[7] I eschewed quantitative sociological instruments such as household surveys to concentrate instead on direct observations, loosely structured interviews, and just hanging out to discover any hidden 'truths'. Second, while I consider myself a sociologist, my professional career had been mostly in forestry until initiating doctoral studies in rural sociology in 2000. This dual orientation approximates Jan Clarke's (2001) 'transdisciplinary disciplines': the transfer of knowledge and skills between two distinct disciplines that shape one's ideas and help value science as both 'expert' and everyday knowledge. However, my approach differs here since I discuss how blended disciplines can both hinder and facilitate field rapport and conceptual understanding.

3.3

To examine the complexities of ecological democracy through community forest decision-making, I decided that qualitative research would be the most fruitful approach. Besides interviewing over 50 respondents who could speak on forestry and democracy, I also spent significant time taking notes on forest conditions and attending meetings. To gain a better understanding of how local forests were being cared for and managed, I planted trees, assisted on forest inventories and biodiversity studies, and participated in an annual forest certification inspection. My research time was divided among Ixtepeji, Yavesía, Oaxaca City, and to a much lesser extent, Mexico City. Even though relatively close to Oaxaca City, travel to the villages was often difficult due to the irregularity of public transport. Since both communities lack hotels or guesthouses, I arranged to stay with local families. This helped build trust, and I gained additional insights into family and community customs.

3.4

As a well-educated and (relatively) wealthy male 'gringo', it may seem that the odds were in my favour. Yet such reductionism tends to disguise hidden discourses of culture and mutual understanding, or the fact that perceived 'truths' or 'lies' may jointly alter the realities of conducting fieldwork (Metcalf, 2002; Rabinow, 1977). My identity as a foreign male was no more enigmatic than their identity as indigenous *campesinos*. Moreover, as I was on their turf, it was perhaps easier for my field contacts to manipulate or influence the direction of my research.

3.5

In my first week in Oaxaca City, I walked into the local office of the World Bank-funded Forest Resources Conservation and Sustainable Management Project (PROCYMAF). The director invited me on a two-day tour of several forest communities in the Sierra Norte. In Ixtepeji, after several presentations were made on local forest management activities at a campsite in the high pine-oak forests, we were treated to a delicious outdoor brunch of *tlatyudas* (grilled tortillas with mole, lettuce, and string white cheese) and steaming hot chocolate. This was an ideal moment to talk with some of the community authorities.^[3] During a later informal meeting with about 30 community authorities, we discussed my intentions and negotiated my 'entry'; much to my delight, there was enthusiastic support. The only conditions were that I was to share my practical knowledge on forestry and ecotourism with the authorities and workers, and report my research findings to them upon completion. It was also agreed that I would give classes in English from time to time.

3.6

Shortly afterward, I attended my first communal assembly in Ixtepeji, a meeting that involves a forthright discussion of issues such as removal of difficult authorities, punishment of forest abusers, and land use

strategies. Local women and non-residents are usually barred from attending. Besides gender or residential status, other barriers to participating in community decision-making limit the democratic nature of the assemblies. For example, as one respondent commented concerning the Oaxacan village of San Felipe El Agua, 'They want you to pay the [municipal] quotas but they won't allow you to even speak at a village meeting! If you speak up, you're often told to shut up if you're not a native [locally born]'. Being allowed to attend an assembly was a major milestone according to Brad, a Yale doctoral graduate student in anthropology and forestry. ^[4] He had worked for 17 months in Oaxaca collecting data in the nearby mountain town of Ixtlán, and confided that he had never attended a communal assembly much as he had tried. It was also rumoured that Ixtepeji was one of the more difficult communities from which to get such an invitation. Brad said I should consider myself fortunate to have achieved this feat early into my field research.

3.7

Yavesía was more problematic to gain entry. Most forestry agencies had no intention of working with the community and warned me to be careful. One state agency official characterized Yavesía as being controlled by 'misguided and violent peasants'. Undeterred, I asked a World Wildlife Fund (WWF) official to arrange a meeting with Ramiro, a community activist and head of Yavesía's ecotourism program. Later, I realized that this was a bit of a test from both the WWF and Yavesía's position regarding my interest and motives. Ramiro lived part of his time in Mexico City to pursue a Master's degree in rural development, but also actively working with other authorities in their legal and municipal activities. His tentative responses to my initial questions may have been masking his intention to discover whose side I was on. After our first *plática* (talk), Ramiro agreed to introduce me to the community. My wife and two children were visiting from Canada and we travelled by a rickety bus almost four hours to Yavesía. We arrived as a television documentary crew was finishing up interviews on an ongoing land conflict with neighbouring communities. We were mostly ignored for about an hour, but eventually were taken to the modest home of a local authority and introduced to his family - the Mendozas. The next day, I had the good fortune once again to take part in a communal assembly where I was formally presented to the villagers.

3.8

Obviously, developing open, friendly relationships with key contacts is crucial to gaining entry into a community and building rapport. For example, '[r]eciprocal associations with one family were often an avenue toward new opportunities for meeting informants (sic), and for following social networks on the ground' (Cohen, 1999:173). This paralleled my experience with the García family in Ixtepeji and the Mendoza family in Yavesía. By living with these two families, I was able to arrange many of my interviews through suggestions and introductions made by my hosts. It brought me much closer into a rich world of cooperative communal celebrations and traditions. By fitting in as part of an extended family - one who was expected to attend community meetings, help with household chores, and be on time for meals - I also may have met Michael Angrosino's (1986) category of a 'nonthreatening outsider'. ^[5]

3.9

With living arrangements made and official approval granted, I began my research. My first few weeks were often frustrating since everyone seemed too busy to spend any time with me, or perhaps were 'testing' me out still. As time wore on, I began to 'learn' the culture and developed close friendships with a few individuals in each community.

3.10

I also experienced some of what Campbell (2001), Kearney (1992), Lartigue (1983), and Nader (1986) underwent in terms of mezcal drinking. Even though I never acquired a taste for the harsh, distilled alcohol

from the agave cactus, I understood its social value. To drink on occasion with the village men was a bonding experience in which feelings were openly shared about practically any subject, a practice that emphasised friendship and goodwill. As Kearney (1972) states, 'the main motivation to drink [in Ixtepeji] is to intensify emotional experience as a means of momentarily transcending a negatively perceived social and geographical environment. ... [Whereas not to drink is] a gain-loss decision-making process in which the traumatic effects of drinking are weighed against the negative social sanctions that accompany abstinence' (Kearney, 1972:109). Here, my previous experience in Peru, where I had also felt pressured to share *chicha* (corn beer) and *aguardiente* (sugar cane alcohol) with Peruvian *campesinos*, helped enormously. After a day of tree planting followed by a raucous night at a local cantina with Ixtepejano authorities, I noticed a change in attitude. It went from mild curiosity about my motives and presence to teasing and off-colour jokes, and then finally to being considered as one of the gang. After this first social bonding experience, I was praised for breaking up a fight between two drunken authorities and being able to hold my mezcal. I also realized like Campbell that good information about cultural and political dynamics could be obtained from these occasional binges: 'People acted freely at the fiestas and other social gatherings, uninhibited by the strictures of the artificial interview setting' (Campbell, 2001:35).^[6]

3.11

On the other hand, this alcohol-laden camaraderie could be dangerous. Alcoholism remains a significant societal anomie among many Ixtepeji and Yavesía men, and the savvy researcher often has to learn 'on the cuff' how to deal with it (Arnold, 1995). To be seen as the *guero* (light-coloured male) who gets drunk all the time would not have been in my best interest. To counter this problem, I tried to avoid sharing drinks. Another tactic was to limit myself to one or two 'shots' of mezcal, then exit as politely as possible so as not to offend. Still, I was not always successful. Choosing not to drink early one morning insulted one forest leader in Ixtepeji, a fact he brought up to me several times over the course of my stay - '*¿Porqué no tomas conmigo? ¡Me prometiste!*' (Why don't you drink with me? You promised!).

3.12

After careful reflection, several factors pointed to what, how, and why things went well, and where plans may have fallen short. As already mentioned, one key consideration that both aided and hindered this research was my past professional experience as a forester and community development worker. Even though the theoretical foundation for this research was primarily sociological in nature, I believe that my forestry background helped put things into perspective, similar to how her biology training helped Clarke (2001). My hands-on experience in forestry put some residents and interviewees at ease. For a short time, I was one of 'them' - namely, the community and the families that I came to know.

3.13

On the other hand, the stigma attached to being a forester was problematic, particularly in Yavesía. It affected how people communicated with me, even what was revealed, and brought into question key factors such as sincerity, honesty, and trust. Foresters are often accused of prioritizing logging over preservation, as the spotted owl debate of the Pacific Northwest demonstrated, although foresters are increasingly trained to address social issues (Hellström & Vehmatso, 2001:45- 46). Regardless, I was probably lumped into a timber-focused category by more than a few environmentally minded individuals.

3.14

Another example further illustrates this point. Some may assume that a prior background in fishing would help to study the social relations of fisherfolk affected by the decline of the Atlantic cod industry. Direct,

practical experience might also permit a deeper understanding of the issues and perspectives at stake. These factors were most certainly the experience of anthropologist Philip DeVita who worked at sea on private yachts and fishing vessels for 15 years, including along the Atlantic Canada coast ([DeVita, 1992](#)). On the other hand, such experience could also backfire if seen by some to be negative 'baggage' since neutrality has been broken (the notion of neutrality is further discussed later). What about those individuals with concern for the environment who take an 'anti-fishing' stance? How will conservationists react to a researcher who 'shares the blame' for engaging in what some may consider an exploitative activity? The researcher may be seen as tainted by presumed complicity with those who earn their living from fishing.

3.15

I suspect that the advantages of being a male, foreign forester, however, far outweighed the disadvantages. I was often introduced to others as 'our friend, a forester from Canada'. This was likely easier to explain than 'forest sociologist', which is not a typical position anywhere (even some personal friends and family have difficulty understanding what it is I do). One Oaxacan resident teasingly asked, 'Trees don't talk! So how can you expect to study them?' Even so, many *campesinos* seemed to grasp this interdisciplinary combination better than non-residents who knew little of forests and those who rely on them. Many people of the Sierra Norte realize that mountain forests are a source of livelihood, protector of soils, and provider of clean water. With this highly attuned socio-ecological understanding, it made sense to many authorities that I had come to study how they made decisions about their forests. Still, it did me little good to become complacent about my *psuedo*-professional role (*psuedo* in the sense that I am no longer a working forester, and since I have often assumed a moderate environmentalist perspective in my career). Some of the above contradictions illustrate the paradox 'that the more we are able to speak with professional competence or confidence, the less important it is that anyone should listen to what we have to say' ([Barnes, 1984](#):102- 103). In this sense, a better position to take was as an uninformed but careful listener.

3.16

The following incident also illustrates how the ambiguity I faced as a social scientist and forester was reconciled. Miguel, a highly respected community forest technician from Ixtepeji, was a much hoped-for interview respondent. Try as I might, Miguel either refused or 'postponed' to be interviewed for several months. It was obvious that he preferred not to waste productive time with a sociologist, and he was unconvinced that I knew anything at all about forestry matters. In my final weeks, I finally convinced Miguel to let me join him on a forest inventory. As we climbed a pine-covered hill, he was worried that I would fall and hurt myself (although it was steep, I had been on similar slopes many times). When we arrived at our sample plot, Miguel asked me to hold a tape measure while he took a reading with his clinometer (tree height measuring tool). After several trees were measured, just for fun, he asked me for an ocular height estimate of a large nearby pine. I put it at 33 metres. Much to his surprise, after measuring it with his clinometer, he found that I had underestimated it by only 50 centimetres. Thinking this to be a fluke, he tested me on other trees. Each time my guess was relatively close to the instrument reading. Afterwards, Miguel finally granted me a highly reflective interview. It seemed that he could relate much better to me as a forester than as a sociologist. Had I not passed his 'test', I may not have been able to gain access to his ample knowledge of local forestry.

General Research Challenges

4.1

I occasionally found it difficult to carry out my interviews. I often had to rearrange dates and times due to cancellations, and some hoped-for interviews were never completed as people became 'too busy' to meet

again. One government official agreed to meet with me on three separate occasions but to no avail - something always came up. For several others, either my questions on political aspects of forestry management in Oaxaca were too sensitive, or they lacked confidence or authority to speak on behalf of their agency. One official practically booted me out of his office, indignantly stating 'What do *I* think of democracy? What kind of question is that? What does it have to do with forestry or tourism? I could tell you my opinion after work over a beer, but I sure can't tell you here in my office!'

4.2

These sorts of incidents, while infrequent, were reminders of a cultural gap between the interviewer and the interviewed. The responsible researcher must accept that academic work carries a certain authority or power ([Montes García, 2001](#)). Whether I liked it or not, my presence was likely viewed as that of an educated outsider peering into their cultural spaces, perhaps uncovering uncomfortable 'truths' in the process. Many key individuals in Metcalf's ([2002](#)) Borneo, Rabinow's ([1977](#)) Morocco, Campbell's ([2001](#)) Juchitán, and Nader's ([1986](#)) Talea also felt suspicious of the researchers' motives, especially in the first few weeks of contact. They were eventually accepted into the community fold, even though they may have been remembered on return visits 'only in an idealized and exaggerated form [since any] negative aspects tend to be forgotten or repressed' ([Nader, 1986:106](#)). In Ixtepeji, for instance, those who knew him, almost in mythical proportion to what he likely experienced, spoke of the anthropologist Michael Kearney in glowing terms.

4.3

Most Ixtepejanos seemed content that I was trained in forestry or was friendly with forestry-related agencies. However, my personal decision not to take an advocacy role may have caused some individuals to distrust me, particularly in Yavesía. Initially, I seemed to enjoy a fair degree of openness with Yavesía's community authorities. Near the end of my research, however, one of my key contacts became reluctant to share his thoughts, contacts, or community documents. During my final visit in early December 2002, he expressed regrets that I could not obtain data being collected by a local agronomist, even though other authorities had earlier given me permission. He told me that this situation had been specifically discussed in a recent community assembly (others later said that no assembly had been held, nor were they aware of this restriction, although they were sympathetic to data sensitivity given their legal-political battles).

4.4

Raised suspicions in Yavesía about my motives were likely worsened by the volatile political situation with their neighbours and certain government agencies, which grew increasingly tense in 2002. This alone may have been sufficient to cause reluctance on the part of community authorities. They knew too well that I was working with other neighbouring communities and interviewing government officials - perhaps even collaborating with them. Yet I think the problem went much deeper than sheer suspicions. As a forester, it may have been assumed that I could not 'see' their ecological position very well. My forestry training and my growing understanding of local conditions convinced me that ecologically and socially sensitive forestry was a feasible option in the Sierra Norte, even if most of Yavesía rejected the possibility. My biggest mistake, I believe, was to voice these thoughts during my final weeks in Yavesía, which most likely alienated me from this particular authority. In his mind, anyone in support of logging must be on the side of their adversaries - the government and the loggers.

4.5

Ironically, my perceived collaboration in Yavesía also caused concern among certain government agencies and NGOs unsympathetic to their struggle. I was made aware of this from the beginning, when a forestry

agency director asked why I had chosen Yavesía, and exactly who had recommended the community to me. This may have been his way of asking whose side I was on. Yavesía was seen as a thorn to some, since their ongoing conflict over an area shared with seven other communities had led to a failure to meet forestry certification requirements. Not surprising, even obtaining a map delineating the contentious land boundaries was difficult.

4.6

I tried my best to avoid a dangerous scenario of taking sides. My daily research always involved balancing a sensitive situation so as not to offend or raise suspicions among my contacts. If maintaining neutrality had cost me friendship with some, I preferred this situation to raising false expectations of any complicity in Yavesía's land title conflict. Stepping over this boundary into explicit political support or advocacy would have probably cost me dearly in gaining access to individuals hostile to Yavesía's predicament. In this respect, my approach departed from Campbell's (2001) 'activist anthropology' or 'politicized ethnography'. Taking sides is a dilemma faced by many researchers in the field. In Whyte's words, 'If the researcher is trying to fit into more than one group, his [or her] field work becomes more complicated. There may be times when the groups come into conflict with each other, and he [or she] will be expected to take a stand' (Whyte, 1981:306). In his ethnographical study of technological change in radiology, Stephen Barley (1990) witnessed an incident of extreme hostility and was asked to assist the aggrieved individual, but chose not to risk compromising his position as a researcher.

4.7

At times, I found myself defending Yavesía to various officials or to other communities. However, taking a much deeper advocacy stand for Yavesía would likely have closed doors elsewhere. I was also cognizant that other foreign researchers in Oaxaca and Chiapas had been asked to leave their study communities (e.g., Klooster, 1997) or even the country in extreme cases due to personal advocacy. If this had occurred, I would have been left with an incomplete study. I needed to examine all facets of ecological democracy to gain a more comprehensive picture. No logging, or complete preservation, was just one possibility for forest-based communities. It really wasn't worth sacrificing other alternatives for the sake of one community's interpretation, even if that option may have been the most ecologically sound (preservation was debated as well, given the pressing problem of fire potential and pine beetle outbreaks). For this research at least, I needed to understand multiple views and practices of forest use (or non-use). Thus, neutrality had to be maintained as much as possible to obtain these varying perspectives. I thought I had achieved such detachment, although some were obviously unconvinced of my neutral stance. This again evokes the forester or the social activist dilemma. For certain individuals, I could not be both, and in retrospect, it may have been foolish of me to expect everyone to believe such a possibility could be so - after all, trees don't talk.

Other Cultural Considerations

5.1

Apart from these concerns, I faced other methodological issues from my comfortable position of privilege, or researcher 'bias'. Along with terms like 'validity', 'objectivity', and 'informants', bias is an ambiguous and contested concept in social research (e.g., Hammersley & Gomm, 1997; Letherby, 2003:7, 70-72). For example, the term bias is 'often used abusively or defensively by anyone who feels challenged by a discussion of the political aspects of the research process' (Letherby, 2003:72). For this reason, and since my research topic *was* political, I avoid the use of 'bias' here but recognize that it exists in the form of 'privilege'.

5.2

In addition to my advantaged position as a wealthy, educated foreigner, perhaps the most difficult aspect to overcome was my own gender. The impact of gender on sociological inquiry has been discussed by other authors, although generally from a female researcher perspective ([Arendell, 1997](#); [Golde, 1986](#); [Ladino, 2002](#); [Letherby, 2003](#); [Vázquez García, 2001](#)). As a man immersed in a culture of *machismo*, it was difficult to overcome a male-oriented perspective. Many rural women felt uncomfortable talking with a strange, foreign male, and often deferred any conversation to their spouses. To compensate for this reluctance, I observed the actions (or inactions) of local women in forestry decision-making and employment, and collected secondary information on the role of women in Oaxacan rural communities. I also attempted to interview women who normally were not involved in key leadership roles or 'hardcore' forestry activities such as logging and running machinery. Much to my surprise, I found that many women (and children) had never even stepped foot in nearby forests.

5.3

Being a foreigner also had both its advantages and disadvantages. Referring back to the difficulties faced by Montes García [2001](#), our very 'gringo-ness' is associated with considerable knowledge, prestige, and wealth. The truthfulness of this is not the point; it is the perception that matters. As a foreigner, doors to elites and *campesinos* may open which may otherwise be closed to autochthonous researchers. On the other hand, a reasonable understanding of the local language or dialect is key to fieldwork anywhere, and foreign researchers may be at a disadvantage, even if they are reasonably fluent. By language, I do not just refer to fluency in an idiom other than one's own, but in the way language is used: tone, words, expressiveness, and body language affect how we are perceived by others (for how male language has dominated society, see [Letherby, 2003](#):30-34). As a native English speaker who is fluent in Spanish, I was comfortable enough to communicate with Mexican residents, both urban and rural. I had first learned Spanish in Guatemala on a 6-week intensive program in 1988. My fluency improved considerably during my work as a forestry assessor in the Peruvian Andes and other projects (<http://www.planeta.com/ecotravel/south/peru/cajamarca2.html>; <http://www.planeta.com/planeta/00/0010peru.html>).^[7] Most of my interviewees were fluent in Spanish. However, at times I did not understand the local linguistic intricacies. New words (for me) and new contexts slowed the interview process in many cases. Conversely, previous words learned in Peru such as *chacra* (small farm) instead of the Mexican equivalent of *lote* or *predio* were often inadvertently incorporated in my daily dialogues with *campesino* colleagues. These errors often served as a humorous conversation icebreaker.

5.4

In my shifting role as forester and sociological researcher, it was often tricky to stay focused. At first, I was worried that I was being seen as just another *preguntón* (nosy person). Over time, though, I was gradually accepted into community life - planting trees, accompanying forest workers, and occasionally participating in meetings. Yet, too much direct involvement may have subtly hidden important pieces of evidence from my view, even by my own doing. As Lartigue ([1983](#)) states, '[in the field, the people] make me understand what I have to see and tell ... but I look and don't see, I listen and don't hear ... what I didn't see, I hid from myself by having forgotten my own presence' ([Lartigue, 1983](#):144). In other words, a complex transformation in the researcher may occur from 'outsider' to 'insider' and back again, continually oscillating between two worlds, and often losing one's sense of balance. To immerse oneself in another culture for an extended period of time implies certain personal sacrifices as positivistic scientific inquiry gives way to heuristic, often obscured meanings (e.g., [Metcalf, 2002](#); [Rabinow, 1977](#)). The very act of participating as both observer and actor transforms and shifts one's perspective, making it difficult at times to separate reality from fiction, or empirical 'facts' from emotive feelings and lived experiences.

Conceptual Lessons

6.1

No 'confessional tale' of a researcher's experience would be complete without mentioning how one's conceptual understanding may have changed after spending significant time in the field. As Denzin puts it, '[t]he researcher, like the subject (sic), is always in the hermeneutic circle, always seeking situations and structures in terms of prior understandings and prior interpretations' ([Denzin, 1989:82](#)). This circle by no means disappears upon returning to one's home country. Here, the ethnographic researcher perceives his or her 'world through eyes that have lost their innocence and now refract reality differently' ([Kearney, 1992:55](#)). I have no doubt that this 'crossing over' and back again was imperative if I was to understand the broader picture. Similar to Jeffrey Rubin's ([1977](#)) study of radical politics in Juchitán, Oaxaca, the *campesinos*' insistence on the centrality of their culture in their lives helped me perceive the connections between their daily life and politics. However, this understanding came much later after I returned to Canada to begin data analysis.

6.2

While still in the field, I didn't always buy Yavesía's argument that forest protection (no commercial logging, but 'controlled' communal use and access) was inherently better than appropriate silviculture. Yavesía's ecological awareness was much greater than I had ever experienced before in working with rural communities. However, the forester 'inside' was likely dominating the sociologist 'self', attesting to my *disadvantaged* position of previous expertise. Forest management was part of my conceptual understanding. I firmly believed that when done correctly, forestry could improve the health of old-growth standing timber.

6.3

After sorting through my interviews, notes, and photographs back home, I came to realize that the forests could be 'managed' in other ways. Indeed, commonly used words such as 'management' and 'democracy' began to take on greater meanings for me. I remembered walking with local residents through the cloud forests where some of the only old-growth fir (*Abies* spp.) of the Sierra Norte remain, with impressive vines and bromeliae hanging from mossy covered branches. In these recollections of images and conversations, I came to 'see' Yavesía's side from an enlightened perspective. If they wished to preserve what they felt were *their* forests, and were basing this decision on a communal and arguably democratic process, then why could this not be a viable alternative? Could it be that all the government and industrial managers, foresters, and wood workers were wrongly accusing Yavesía of taking an unreasonable position? When does a rationale based on a deeply felt love of forests and the life they sustain overcome an economic logic, sustainable or otherwise? Eventually, I accepted Yavesía's position as just as 'valid' as those pressuring them to log their forests. The sociologist side finally came to inform the forester locked within. Yet, I couldn't have achieved this conceptual insight without having spent significant time in Yavesía and their woods, sharing biographies with other social beings to make and interpret various knowledge-claims ([Stanley, 1993](#)).

6.4

I also realized that my fieldwork had put me in contact with another world that necessitated collaborative communication and understanding. As Liz Stanley puts it, our lives as sociologists 'are composed by a variety of social networks of others that the subject of 'a life' moves between' ([Stanley, 1993:50](#)). Knowledge-production differs by social-location and the complex weaving of multiple biographies ([Stanley, 1993](#)), as well as by the 'blurred boundaries and shared practices' of multiple identities ([Clarke, 2001](#); [Ladino, 2002](#)). The shifting of various lives through shared (and unshared) experiences, researcher and researched alike,

helped me achieve a degree of reflexivity that informed and shaped my research. For example, although socio-environment change for the two communities studied was not an essential outcome of my research, I realize that it remains essential for both 'social-locations'. It is my obligation, not just as a researcher, but more importantly as a friend and collaborator, that I continue to work with Ixtepeji, Yavesía, and other communities on *their* terms whenever possible and appropriate. This must be the case even if I must do so from within the realm of my comfortable gringo world.

Conclusion

7.1

In this paper, I have argued that self-reflection as a social researcher continues to be a worthy endeavour to bring things into a clearer perspective - both for researcher and for those researched. My goal has been to reach a greater understanding of my own fieldwork rather than presenting some 'wild and woolly involuted tract ... that seems to suck its author (and reader) into a black hole of introspection' ([van Maanen, 1988:92](#)). It has not been my intention to advocate that one must have spent time in the trenches, or have had a previous degree in a relevant thematic area to make for a successful research study. A police officer does not need a psychology degree to make an arrest or to calm a domestic dispute (although arguably it may help!). Obtaining reams of multiple expertise is most likely impractical, if not downright improbable, for most researchers. Furthermore, as shown in this paper, it is not always beneficial to be experienced in certain fields, since accusations of partiality may ensue.

7.2

Field research processes can be more straightforward if the researcher comes clean with his or her specific socio-cultural perspectives. Any potential weaknesses can be turned into study strengths with a little effort and a willingness to look, listen, learn, and apply. Field research dealing with humans is never one-sided but rather an experiential give-and-take of shifting circumstances. The researcher-researched interaction process is continuously negotiated and re-negotiated, as it must be.

7.3

This forthright discussion should assist others in conducting field studies in regions or countries not entirely familiar to the researcher. It makes little difference whether the researcher is 'on an exploration into unknown territory' ([Whyte, 1981:357](#)), or a well-trodden path that hints at new discoveries. More importantly, high flexibility in research methodologies and genuine attempts to transcend cultural barriers are essential where the study environment is constantly shifting. An adaptable and open attitude to field studies, combined with significant time spent in local discourse and socio-cultural activities, may make the difference in gaining acceptance and conducting successful interviews. Likewise, as field researchers we must not shy away from previous work experiences (or lack thereof) and our positions of privilege. Instead, field challenges should be faced head on, even embraced and used to mutual advantage whenever possible and appropriate.

Notes

¹Maintaining neutrality may not always be desirable. Much depends on the kind of research methodology to be used or the cultural sensitivities of the study. For example, participatory action research necessitates a fair degree of researcher activism, and research in dangerous settings such as with drug traffickers or users may

make it necessary to abandon neutrality (e.g., [Lee, 1995](#)).

² *Street Corner Society* was first published in 1943 without the confessional elements it now contains in Appendix A of the 1981 edition.

³ On this trip a World Bank anthropologist asked me if I had read Kearney's ([1972](#)) *The Winds of Ixtepeji*. After sheepishly confessing that I had not even heard of it, he suggested that many anthropologists regard it as a classic. I was also amazed to find that some Ixtepejanos have their own Spanish copy, and many still remember Dr. Kearney.

⁴ All names of personal contacts mentioned have been changed to protect their confidentiality.

⁵ In the field, it fascinated me that there was a greater sense of punctuality by indigenous people than many Oaxacan urbanites. My field interviews and meetings were generally held at the appointed time, whereas these could be delayed by hours in Oaxaca City, and were often rescheduled. Most indigenous communities in Oaxaca do not adjust their clocks to state- imposed daylight savings time, and my contacts would arrange to meet at 'normal' time, not 'city' time.

⁶ Campbell also discusses the negative aspects of combining research with drinking, taking pains to avoid whitewashing 'the problems created by machismo, patriarchy, and alcoholism' ([Campbell, 2001](#):32).

⁷Published on the Planeta.com website <http://www.planeta.com>

Acknowledgements

This research has been supported by the University of Alberta, the Social Sciences and Humanities Research Council, the International Development Research Centre, and the Organization of American States. My sincere thanks go to the two anonymous reviewers and editors of *Sociological Research Online* for their suggested improvements on an earlier version. I also thank Debra Davidson, Judith Golec, and Michael Kearney for their thoughtful advice. The communities of Santa Catarina Ixtepeji and Santa María Yavesía, and all who shared their time, wisdom, and experience, also deserve my immense gratitude. Any errors or omissions are mine.

References

ANGROSINO, M. V. (1986) 'Son and Lover: The Anthropologist as Nonthreatening Male', in T. L. WHITEHEAD and M. E. CONAWAY (editors) *Self, Sex, and Gender in Cross-Cultural Fieldwork*. Urbana and Chicago: University of Illinois Press, pp. 64-83.

ARENDELL, T. (1997) 'Reflections on the Researcher-Researched Relationship: A Woman Interviewing

Men', *Qualitative Sociology*, Vol. 29, No. 3, pp. 341- 68.

ARNOLD, J. C. (1995) 'Researcher Subjectivity and Narrative Flow in Ethnographic Texts: The 'Alcohol Man' in the Field', <<http://jamescarnold.home.comcast.net/Ethnog.htm>>, accessed on 7 December, 2003.

BARLEY, S. R. (1990) 'Images of Imaging: Notes on Doing Longitudinal Field Work', *Organization Science*, Vol. 1, No. 3, pp. 220-247.

BARNES, J. A. (1984) 'Ethical and Political Compromises in Social Research', *Wisconsin Sociologist*, Vol. 21, pp. 100-111.

BEHAR, R. (1999) 'Ethnography: Cherishing our Second-Fiddle Genre', *Journal of Contemporary Ethnography*, Vol. 28, No. 5, pp. 472-84.

CAMPBELL, H. (2001) *Mexican Memoir: Personal Account of Anthropology and Radical Politics in Oaxaca*. Westport, CT: Bergin & Garvey.

CLARKE, J. (2001) 'From Biologist to Sociologist: Blurred Boundaries and Shared Practices' in M. Mayberry, B. Subramaniam, and L. H. Weasel (editors) *Feminist Science Studies: A New Generation*. New York: Routledge, pp. 35-41.

COHEN, J. H. (1999) *Cooperation and Community: Economy and Society in Oaxaca*. Austin, TX: University of Texas Press.

COTTERILL, P. and LETHERBY, G. (1993) 'Weaving Stories: Personal Auto/Biographies in Feminist Research', *Sociology*, Vol. 27, No. 1, pp. 67-79.

DENZIN, N. K. (1989) *Interpretive Interactionism*. Beverley Hills, CA: Sage.

DEVITA, P. R. (1992) 'Greasy Hands and Smelly Clothes: Fieldworker or Fisherman?', in P. R. DeVita (editor) *The Naked Anthropologist: Tales From Around the World*. Belmont, CA: Wadsworth Publishing, pp. 156-64.

GOLDE, P. (editor) (1986) *Women in the Field: Anthropological Experiences*. 2nd ed. Berkeley: University of California Press.

HALEY, B. D. (1999) 'Indigenous Politics, the New Primitivism, and Responsible Research', *UC MEXUS News* Vol. 36, No. Winter , accessed on 30 January, 2003.

HAMMERSLEY, M. and GOMM, R. (1997) 'Bias in Social Research', *Sociological Research Online* Vol. 2, No. 1 <<http://www.socresonline.org.uk/2/1/2.html>>, accessed on 7 December, 2003.

HELLSTRÖM, E. and VEHMATSO, E. (2001) 'Environmental Forest Conflicts in the United States: Conflict Patterns in the Pacific Northwest and Minnesota', EFI (European Forest Institute), Working Paper 22 <http://www.efi.fi/publications/Working_Papers/WP_22.pdf>, accessed on 19 August, 2003.

KEARNEY, M. (1972) *The Winds of Ixtepeji: Worldview and Society in a Zapotec Town*. Prospect Heights, Illinois: Waveland Press, Inc.

KEARNEY, M (1992) 'A Very Bad Disease of the Arms', in P. R. DeVita (editors) *The Naked Anthropologist: Tales From Around the World*. Belmont, CA: Wadsworth Publishing, pp. 47-57.

KEARNEY, M. (2004) *Changing Fields of Anthropology: From Local to Global*. Lanham, MD: Rowman & Littlefield Publishers, Inc.

KLOOSTER, D. (1997) *Conflict in the Commons: Commercial Forestry and Conservation in Mexican Indigenous Communities*. Ph.D. dissertation, Department of Geography, University of California - Los Angeles, Los Angeles, CA.

LADINO, C. (2002) 'You Make Yourself Sound so Important' Fieldwork Experiences, Identity Construction, and Non-Western Researchers Abroad', *Sociological Research Online* Vol. 7, No. 4 <<http://www.socresonline.org.uk/7/4/ladino.htm> >, accessed on 18 August, 2003.

LARTIGUE, F. (1983) *Indios y Bosques: Políticas Forestales y Comunes en la Sierra Tarahumara*. México, D.F.: Centro de Investigaciones y Estudios Superiores en Antropología Social, Ediciones de la Casa Chata 19.

LEE, R. M. (1995) *Dangerous Fieldwork*. Thousand Oaks, CA: Sage Publications.

LEATHERBY, G. (2003) *Feminist Research in Theory and Practice*. Buckingham, Philadelphia: Open University Press.

METCALF, P. (2002) *They Lie, We Lie: Getting on with Anthropology*. London and New York: Routledge.

MILLS, C. W. (1959) *The Sociological Imagination*. New York: Oxford University Press.

MONTES GARCÍA, O. (2001) 'Encuentros y Desencuentros en la Etnografía', *Revista Española De Antropología Americana*, Vol. 31, pp. 203-22.

NADER, L. (1986) 'From Anguish to Exultation' in P. Golde (editors) *Women in the Field: Anthropological Experiences*. 2nd ed. Berkeley: University of California Press, pp. 97-116.

RABINOW, P. (1977) *Reflections on Fieldwork in Morocco*. Berkeley: University of California.

RUBIN, J. W. (1997) *Decentering the Regime: Ethnicity, Radicalism, and Democracy in Juchitán, Mexico*. Durham, NC: Duke University Press.

STANLEY, L. (1993) 'On Auto/Biography in Sociology', *Sociology*, Vol. 27, No. 1, pp. 41-52.

STEIER, F. (1991) *Research and Reflexivity*. London and Newbury Park, CA: Sage.

VAN MAANEN, J. (1988) *Tales of the Field: On Writing Ethnography*. Chicago: The University of Chicago

Press.

VÁZQUEZ GARCÍA, V. (2001) 'Taking Gender into Account: Women and Sustainable Development Projects in Rural Mexico', *Women's Studies Quarterly*, Vol. 29, No. 1,2, pp. 85-98.

WEBER, M. (1949) *The Methodology of the Social Sciences*. E. A. Shils and H. A. Finch (translators and editors). New York: Free Press.

WHITEHEAD, T. L. and CONAWAY, M. E. (editors) (1986) *Self, Sex, and Gender in Cross-Cultural Fieldwork*. Urbana and Chicago: University of Illinois Press.

WHYTE, W. F. (1981) *Street Corner Society: The Social Structure of an Italian Slum*. 3rd ed. Chicago: University of Chicago Press.



[Copyright Sociological Research Online, 2004](#)

